

System Administration (SA) Overview for Version 4.2



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System Administrator Responsibilities

- **Maintaining the Security Model**
- **Defining and Maintaining the Desktop Templates**
- **Setting up and Maintaining General Desktop Features**
- **Maintaining Clauses**
- **Maintaining Vendor and Organization Information**
- **Performing Database Operations**



System Administration Enhancements

There are four (4) new tasks in System Administration and twelve (12) enhancements to existing tasks in Version 4.2 Increment 1 of the SPS application



Enhancements

- **CLIN TEMPLATES**

- Can create an unlimited number of new CLIN templates per contract type.

- **PIIN Maintenance**

- Create PIIN serial ranges.
- Multiple DoDAANs

- **ADDRESS LAYOUTS**

- Can create address layout for any country, FPO/APO.
- Establish default format for the site.



CLIN Template

Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

System Administration

Tasks

- Auto Closeout
- Auto Order
- Buy USA
- CDL Tmpl
- CLIN Templates

CLIN Templates

Bookmark Maintenance

Template Maintenance

Search By

- ☒ Contract Type
- ☐ IDC Type
- ☐ Description

Display

- ☒ Active
- ☐ Deleted
- ☐ Both

Search For:

Template Description	Default
COST NA DEFAULT-EDI	<input checked="" type="checkbox"/>
COST DQ - Default	<input checked="" type="checkbox"/>
Thelma	<input checked="" type="checkbox"/>
ROGER COST	<input checked="" type="checkbox"/>
COST REQ - Default	<input checked="" type="checkbox"/>
COST IQ - Default	<input checked="" type="checkbox"/>
COST-N/A Custom Format One Default	<input type="checkbox"/>
Cost-N/A Custom Format One Default	<input type="checkbox"/>

New...
Update...
Delete
Close

Close

The Sys Admin can now create new CLIN Templates and also indicate the default template for the various types of contracts.

There are now two tabs – ‘CLIN Template’ and ‘Bookmark Maintenance’.

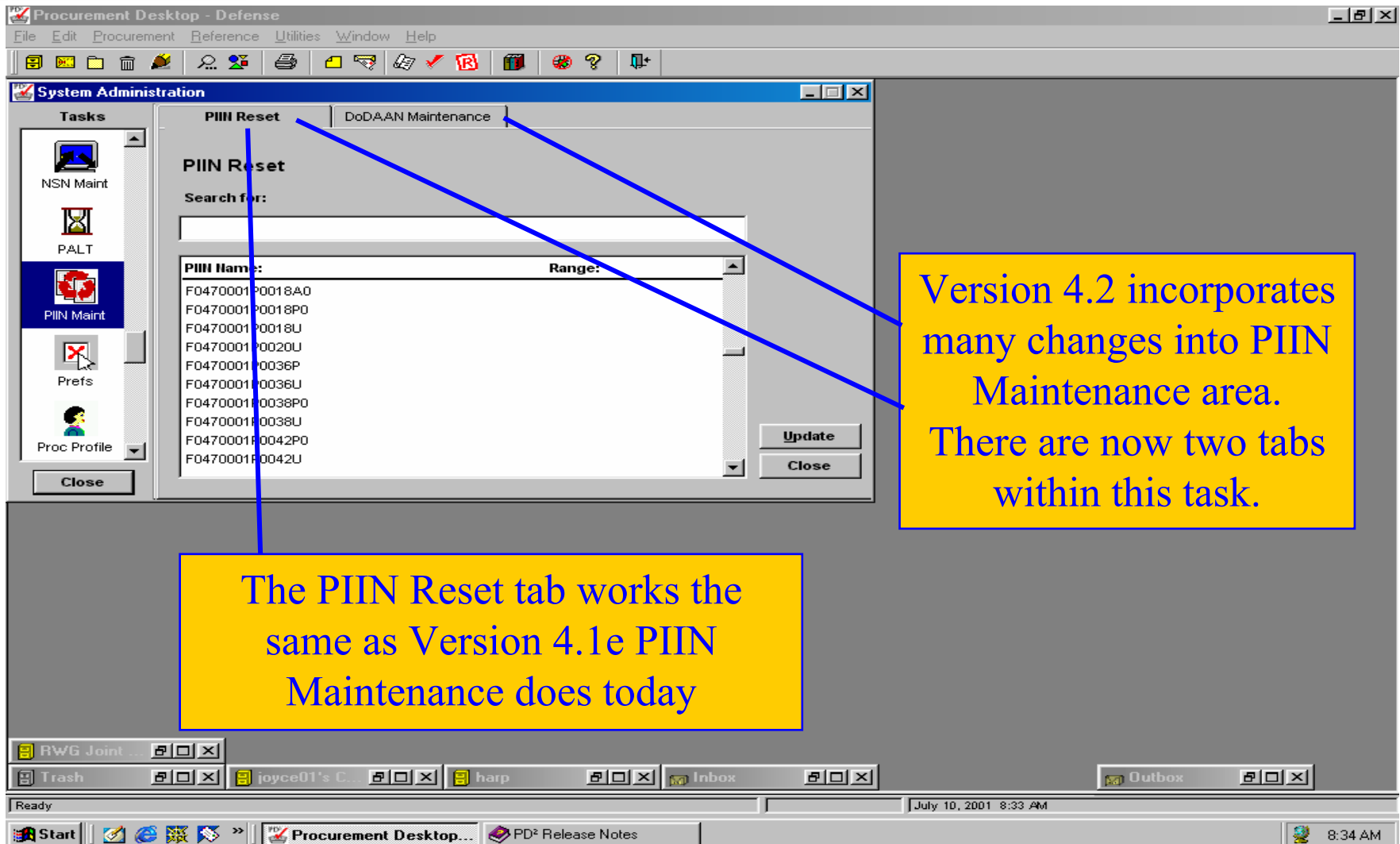
The Sys Admin can now limit the display to Active, Deleted, or Both to display both kinds of templates.

Ready July 10, 2001 10:43 AM

Start Procurement Desk... PD* Release Notes Document4 - Microsoft ... Exploring - 3½ Floppy [A:] 10:44 AM

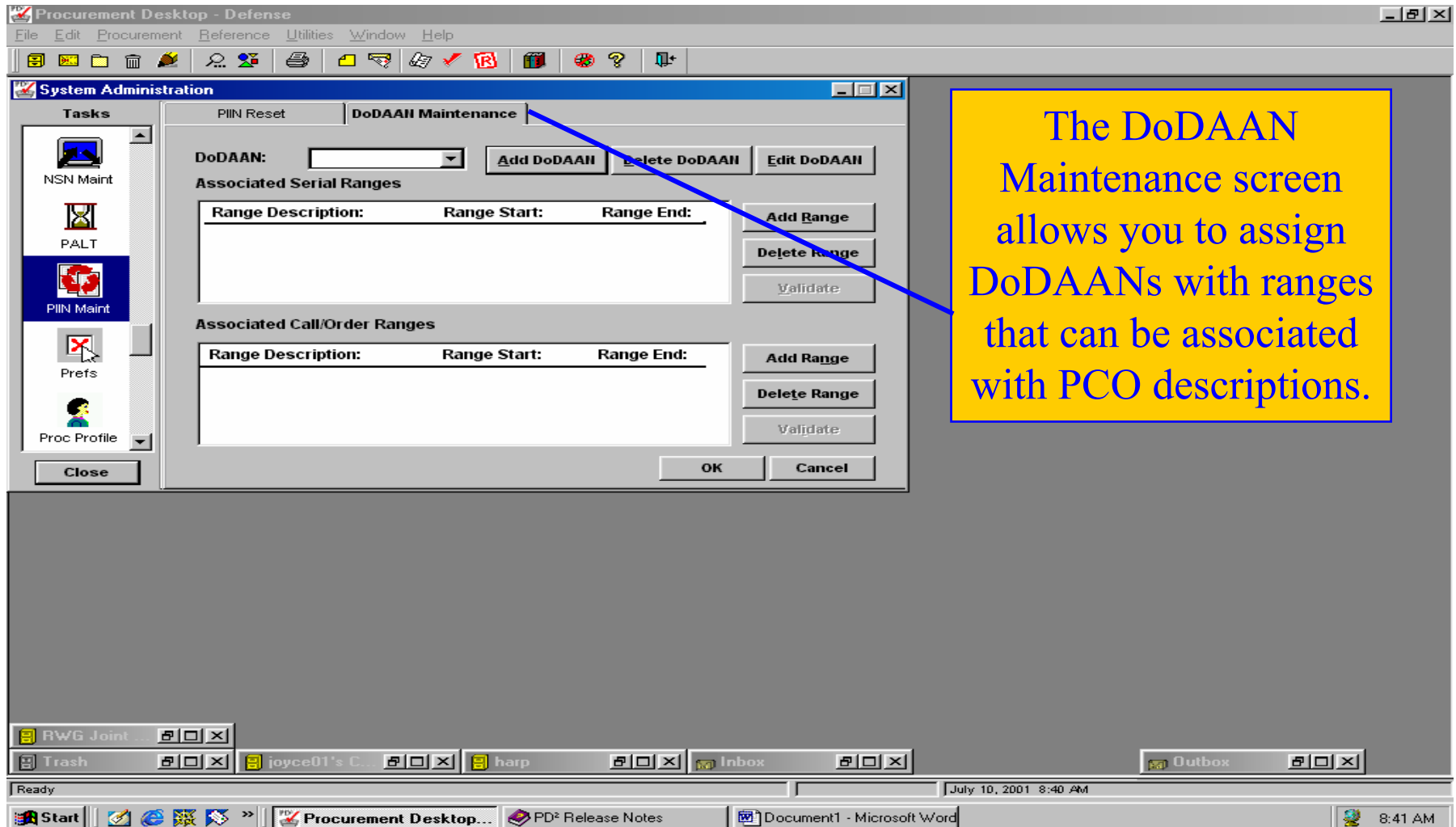


PIIN Maintenance





PIIN Maintenance



The DoDAAN Maintenance screen allows you to assign DoDAANs with ranges that can be associated with PCO descriptions.



Address Layouts

Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

System Administration

Tasks

- ASF
- Addr. Layout
- Analysis
- Approval
- Attachment

Close

Address Layout Maintenance

Search For:

Layout Name	Default	Creation Date
Foreign country	<input type="checkbox"/>	2/16/01
Standard (U.S.)	<input checked="" type="checkbox"/>	1/1/00

Notify Users

New...
Update...
Delete
Close

Click on 'New...' to create an additional address layout style.

The SPS application will be delivered with the Standard (U.S.) address layout

Ready July 9, 2001 10:40 AM

Start | Procurement Desk... | Document3 - Microsoft ... | Exploring - Office | System Administration | 10:41 AM



Address Layouts

Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

System Administration

Tasks

- ASF
- Addr. Layout
- Analysis
- Approval
- Attachment

Close

Address Layout Maintenance-New

Layout Name: Spain

Default Format: ☐

Address Format

City
State
Zipcode
Country
Country
.
(
)
<space>

Contact
Organization Name
Street Addr Ln 1
Street Addr Ln 2
City <space> Country <space>

Left Right Up Down OK Cancel

Enter a name for the new layout.

Choose the various format items from the menu. Making sure you select any characters or spaces necessary for formatting.

Use the 'Left', 'Right', 'Up', and 'Down' buttons to arrange your format items.

Ready July 9, 2001 10:48 AM

Start Procurement Desk... Document3 - Microsoft ... Exploring - Office System Administration 10:49 AM



Enhancements Conti.

- **NSN Maintenance**

- The NSN Maintenance tab from Auto Order tasking has been moved to a new tasking called NSN Maintenance
- Allows entry of Local Stock Numbers

- **System Tables**

- Allows the SA to maintain lists of codes that are associated with various procurement documents.



NSN Maintenance

Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

System Administration

Tasks

- Local Info
- BANNER
- MOTD
- Milestone
- NSN Maint**
- PALT

Close

NSN Maintenance

Search By

- ☒ NSN
- ☐ Description

Extended Description

NSN:	Description	Unit of Issue	Var
1005-00-118-6192	Firing Attachments	Each	
Firing Attachments, NSN 1005-00-118-6192			
1005-00-288-3565	Swabs	Each	
Small Arms Cleaning			

New... Update... Delete Close

Select 'New...' to add a new NSN.

Ready July 9, 2001 12:33 PM

Start Procurement Desktop... Exploring - Office System Administration Document2 - Microsoft Word 12:34 PM



NSN Maintenance

- **NSN Data Fields**
 - NSN
 - Description
 - Unit of Issue
 - Brand Name/Sole Source
 - Variation in Qty (+)
 - Variation in Qty (-)
 - Extended Description



NSN Maintenance

Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

System Administration

Tasks

- Local Info
- BANNER
- MOTD
- Milestone
- NSN Maint**
- PALT

Close

NSN Maintenance - Add

NSN:

Description:

Unit of Issue:

Brand Name/Sole Source:

Variation in Qty (+):

Variation in Qty (-):

Extended Description:

OK Cancel

Ready July 9, 2001 12:34 PM

Start | Procurement Desktop... | Exploring - Office | System Administration | Document2 - Microsoft Word | 12:35 PM

This is the “ADD”
page that the SA will
use to load the
information associated
with a NSN.



NSN Maintenance

- **Location of NSN Maintenance function within the SPS application has been moved to the Detail Tab in Line Item Detail**
- **An NSN Search Button has been added**



NSN Maintenance

Procurement Desktop - Defense

File Edit Line Items Document Options Window Help

Line Item Detail

Detail Description Pricing Funding Shipping Payment Local Info

Line Item Number: 0001 Contract Type: **Change** FFP IDC Type: N/A Hand Carry: ☐

NSN: **Search** CLIN Type: ☒ Priced ☐ Info Only

Description: clin 1

Extended Description:

Quantity: 22.00 Unit Price: 99.00 Line Item Cost: 2,178.00

Item Calculation: 22.00 X 99.00 = 2,178.00

Unit of Issue: Options: Opt #: Cost Constraint:

Step/Order Pricing: ☐ Test Type: No Test ☐ Exhibit ☐ Include Sublines

Template: FFP N/A - Default

Global Chg... Test Info Delivery Copy CLIN Add Insert SubCLIN Add Insert Delete Associate OK Cancel

The user can search for existing NSNs that reside in the database, by clicking on the 'Search' button.

The user will notice the new NSN field on this screen.

RWG Joint ... Trash harp Inbox Outbox

Ready July 9, 2001 12:38 PM

Start Procurement Desktop... Exploring - Office System Administration Document2 - Microsoft Word 12:39 PM



System Tables

- **There are 25 sub-tasks that the SA will have to load prior to any user having access to these tables and their subsequent codes.**
- **The SA can add, update, activate and inactive the codes in each of the sub-tasks**
- **These tables contain codes that are identified and maintained by the SA, who can add, update, activate, and inactivate codes for each type of procurement instrument.**
- **These tables are maintained in a list format within each of the sub-taskings.**

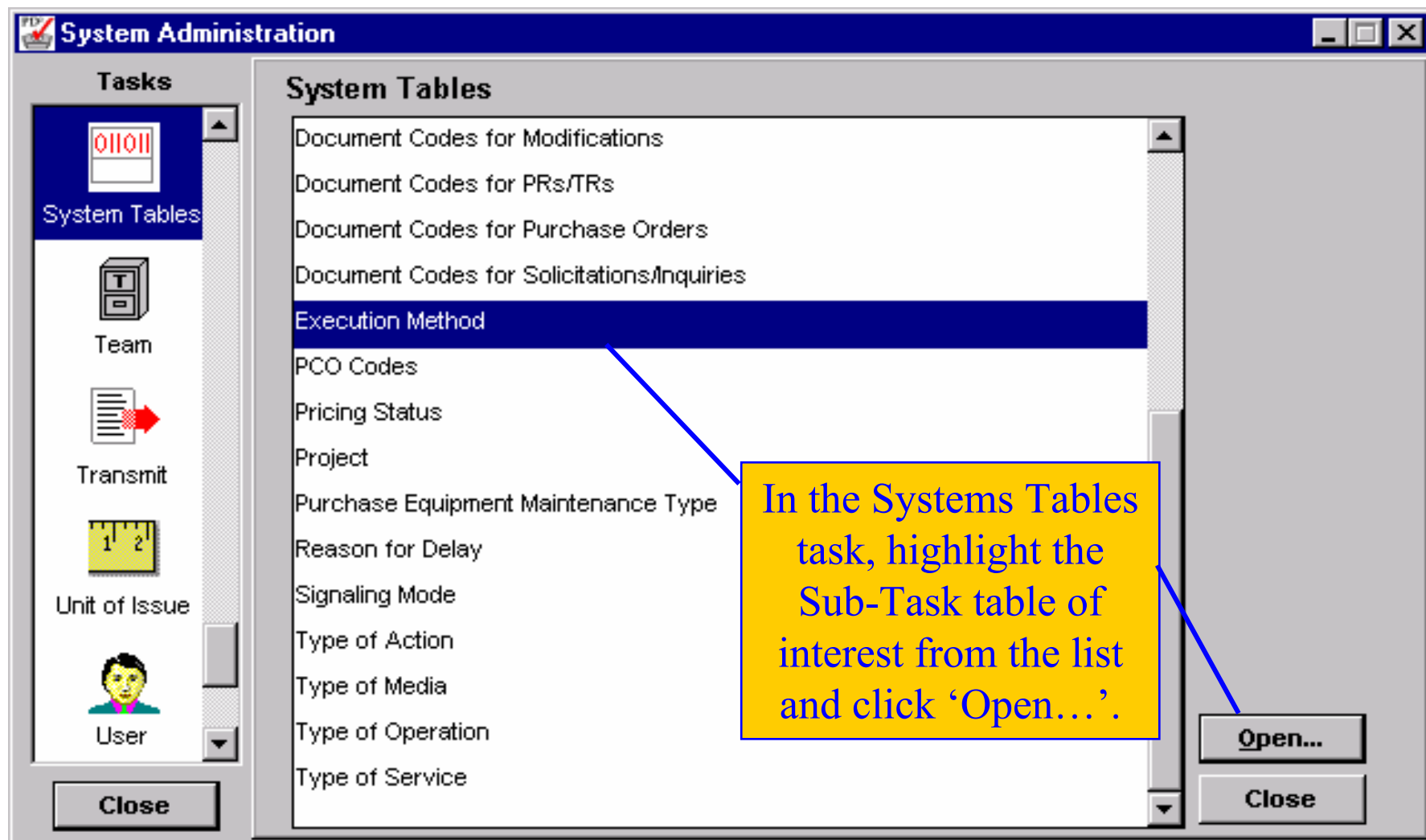


System Tables

- The codes in each of the sub-tasks are sorted alphanumerically by **Active, Inactive, or All** depending on the selection made by the SA in the 'Show:' drop down list box.
- The codes may also be sorted alphanumerically in ascending and descending order when the SA selects the **Code, Description, or Active** column headings.



System Tables





System Tables

System Administration

Tasks

- System Tables
- Team
- Transmit
- Unit of Issue
- User

Execution Method

Exec Mthd Code	Description	Active
		<input checked="" type="checkbox"/>
BPA	Blanket Purchase Agreement	<input checked="" type="checkbox"/>
DO	Delivery Order	<input checked="" type="checkbox"/>
FS	FIRING SQUAD	<input checked="" type="checkbox"/>
TM	Test Method	<input checked="" type="checkbox"/>

To insert a new code into the table, click 'Add'. This will insert a blank line at the top of the screen.

Enter the code and description for the specific tasking (use the full title of the code that is being added).

Show:

Add **Delete** **OK** **Cancel**

Close



Enhancements Conti.

- **Estimating Fields**

- Define customized templates for summary-level cost information
- Update existing templates
- Copy templates and fields within templates
- Make existing templates inactive

- **Assigning Codes**

- The SA can now assign codes to an individual user profile such as the DODAAN, PCO and ACO codes



Estimating Fields

- **The templates defined in this task are implemented in Proposal Cycle Documents such as:**
 - Government Estimate
 - Contractor Proposal
 - Technical Analysis Report (TAR)
 - Audit
 - Government Objective
 - Government Negotiation
- and the Pre- and Post Negotiation Position (PNP) document.**



Estimating Fields

- Estimating templates store field definitions and calculations that populate the summary-level cost estimating fields from within a template.
- Fields created in estimating templates must have field names, but do not have to contain data.
- An estimating template can contain a maximum of 250 fields.
- The field labels, types, and calculations can also be customized.
- Duplicate template names and field numbers cannot be used, and template names, field numbers, and field names cannot be left blank.



Estimating Fields

Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

System Administration

Tasks

- Closeout
- Contract Type
- Currency
- EDI
- Est Fields

Close

Estimating Template

Template Name:

Template Description:

Estimating Fields

Search By

- ☒ Field Number
- ☐ Field Name
- ☐ Field Type

Search For:

#	Field Name	Field Type

OK

New...
Copy
Update...
Delete
Cancel

Estimating Template the SA will manage the templates that have been created

Ready July 9, 2001 12:22 PM

Start Procurement Desktop... Exploring - Office System Administration Document1 - Microsoft Word 12:23 PM



Estimating Fields

Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

System Administration

Tasks

- Closeout
- Contract Type
- Currency
- EDI
- Est Fields

Close

Estimating Fields Task

Template:

Field Number: Sum this field when bundling? ☐

Field Name:

Field Description:

Type of Field

☐ Currency ☐ Product

☐ Number ☐ Sum

Estimating Fields

Estimating Fields

OK

Cancel

Estimating Fields Task screen, is where the SA will fill in the information to establish the fields within the estimating document.

Ready

July 9, 2001 12:23 PM

Start | Procurement Desktop... | Exploring - Office | System Administration | Document1 - Microsoft Word | 12:24 PM



Procurement Profile

Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

System Administration

Tasks: Prefs, Proc Profile, Reactivate, Reports, Route

User: joyce03

Address: AEDC/PK Code: F40600

Details... Delete

Phone: 504-895-7777, Ext 1458 Fax: 703-299-8878

E-mail: joyce03@DCMA.mil

Defaults: DoDAAN: LRL001 Select DoDAAN Call/Order Code: LR

Employee Code: Payment Plan: Occupation Series: Grade: PCO Code: nw9bangor ACO Code: nw9bremer

Cancel

Purchase Request

Inbox 2000 clins sharkey Trash lillian M1449 Outbox sharkey's boa joyce03's C...

Ready July 10, 2001 1:43 PM

Start SPS221 Procurement Desktop... Exploring - C:\WINNT\Pro... Microsoft Word - Assigning... 1:44 PM

Use the new drop down menus on the screen under Proc Profile to select both the PCO and ACO codes to be associated with the selected individual. The drop down menus will only contain the codes that were previously loaded into System Tables under System Administration that are in "Active" status.



Procurement Profile

Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

System Administration

Tasks: Prefs, Proc Profile, Reactivate, Reports, Route

User

User: joyce03

Address: AEDC/PK Code: F40600

Details... Delete

Phone: 504-895-7777, Ext 1458 Fax: 703-299-8878

E-mail: joyce03@DCMA.mil

Defaults: DoDAAN: LRL001 Select DoDAAN Call/Order Code: LR

Employee Code:

Payment Plan: Occupation Series: Grade:

PCO Code: nw9bangor ACO Code: nw9bremer

LAU1 Laura

M1A Joe Langendurfer

nw9bangor OICC Bangor, WA

nw9bremer oicc bremerston

p4c Joshua

so7inglsd roicc ingleside

Cancel

Purchase Request

Inbox, 2000 clins, sharkey, Trash, lillian, M1449, Outbox, sharkey's boa, joyce03's C...

Ready July 10, 2001 1:43 PM

Start SPS221 Procurement Desktop... Exploring - C:\WINNT\Pro... Microsoft Word - Assigning... 1:44 PM

'Select DoDAAN' button allows the SA to associate the previously loaded DODAANs to the individual



Enhancements Conti.

- **Lines of Accounting/Funding structure has changed**
 - The SA can now create a line of accounting, designate a default format, and associate it with a specific UIC
 - The SA can also copy the existing line of accounting and edit existing lines of accounting



Lines of Accounting/Funds

Funding Source - New

Funding Format:
Navy

Funding Source

Department Code (2):	17	Issuing Department Code (2):	97
Fiscal Year (4):	2001	Treasury Account Number (4):	4930
Subhead / Limit (4):	NH5A	Accounting Station Number (8):	
Object Class (3):	000	Bureau Control Number (5):	77777
Suballotment (1):	0	AAA / Station Number (8):	00068894
Transaction Type (2):		Property Accounting Activity (6):	
Cost Code(12):		FMS Line Item (3):	
Standard Document Number (17):			

Display:
17 97 2001 4930 NH5A 000 77777 0 00068894

OK Cancel

From the Line Item Detail window the user would select the Funding tab and then New button - The Funding Sources – New screen will appear. The first field, Department Code, will be pre-populated based on the Funding Format you select.

Version 4.2 now breaks the LOA into segments for the standard LOA chosen. These segments will differ based on the Funding Format you select.



Additional Enhancements

- **Automatic Closeout**
 - Authorized Users can Automatically Closeout Awards
 - SA's can closeout awards for single users, teams, or all users in the system
 - Works in conjunction with Auto Closeout Criteria in the Closeout Task
- **Telecommunications Request Form/Mod**
 - The SA will grant menu access to users or groups that will use the function



Additional Enhancements

- **Agreements**
 - The SA will grant menu access to those users or groups that require access
 - New Menu Additions were Added for Basic Agreements, Basic Ordering Agreements, or Master Agreements for Repair and Alteration of Vessels.
- **Purchase Request Enhancements**
 - PRs now must be Generated and can include Clauses, Inspection and Acceptance Terms, Delivery Information, and IDC Constraints



Additional Enhancements

- **Local Info**

- An unlimited number of data fields can be added at the document chain level and vendor level
- SA can then relate the data fields to interface data

- **Reference Library & Local Books**

- Now allows direct connection to the internet



Questions?
